

Form 990

## Return of Organization Exempt From Income Tax

2009

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

► The organization may have to use a copy of this return to satisfy state reporting requirements

## A For the 2009 calendar year, or tax year beginning 01-01-2009 and ending 12-31-2009

B Check if applicable	C Name of organization ACTON INSTITUTE FOR THE STUDY OF RELIGION AND LIBERTY		D Employer identification number 38-2926822
<input type="checkbox"/> Address change	Doing Business As		E Telephone number (616) 454-3080
<input type="checkbox"/> Name change	Number and street (or P O box if mail is not delivered to street address) 161 OTTAWA AVE NW No 301		G Gross receipts \$ 5,422,543
<input type="checkbox"/> Initial return	Room/suite		
<input type="checkbox"/> Terminated			
<input type="checkbox"/> Amended return			
<input type="checkbox"/> Application pending	City or town, state or country, and ZIP + 4 GRAND RAPIDS, MI 495032718		

F Name and address of principal officer ROBERT SIRICO 161 OTTAWA AVENUE NW SUITE 301 GRAND RAPIDS, MI 49503	H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
--	--

I Tax-exempt status <input checked="" type="checkbox"/> 501(c) ( 3 ) ► (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions)
--	---

J Website: ► WWW ACTON ORG	H(c) Group exemption number ►
----------------------------	-------------------------------

K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ►	L Year of formation 1990	M State of legal domicile MI
---	--------------------------	------------------------------

## Part I Summary

1 Briefly describe the organization's mission or most significant activities TO PROMOTE A FREE AND VIRTUOUS SOCIETY CHARACTERIZED BY INDIVIDUAL LIBERTY AND SUSTAINED BY RELIGIOUS PRINCIPLES	
2 Check this box ► if the organization discontinued its operations or disposed of more than 25% of its net assets	
3 Number of voting members of the governing body (Part VI, line 1a) . . . . .	3 14
4 Number of independent voting members of the governing body (Part VI, line 1b) . . . . .	4 13
5 Total number of employees (Part V, line 2a) . . . . .	5 39
6 Total number of volunteers (estimate if necessary) . . . . .	6 30
7a Total gross unrelated business revenue from Part VIII, column (C), line 12 . . . . .	7a 0
b Net unrelated business taxable income from Form 990-T, line 34 . . . . .	7b -55,343

8 Contributions and grants (Part VIII, line 1h) . . . . .	Prior Year 5,901,396	Current Year 4,877,260
9 Program service revenue (Part VIII, line 2g) . . . . .	157,630	399,591
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .	134,807	13,523
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	44,541	-3,558
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .	6,238,374	5,286,816

13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) . . . . .	100,622	304,510
14 Benefits paid to or for members (Part IX, column (A), line 4) . . . . .		0
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,225,642	1,908,288
16a Professional fundraising fees (Part IX, column (A), line 11e) . . . . .		0
b Total fundraising expenses (Part IX, column (D), line 25) ► 359,456		
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) . . . . .	3,046,662	1,795,113
18 Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)	5,372,926	4,007,911
19 Revenue less expenses Subtract line 18 from line 12 . . . . .	865,448	1,278,905

20 Total assets (Part X, line 16) . . . . .	Beginning of Current Year 5,155,778	End of Year 6,363,086
21 Total liabilities (Part X, line 26) . . . . .	162,181	226,374
22 Net assets or fund balances Subtract line 21 from line 20 . . . . .	4,993,597	6,136,712

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge		
***** Signature of officer ROBERT SIRICO PRESIDENT Type or print name and title	2010-06-03 Date	

Paid Preparer's Use Only	Preparer's signature ► MARGARET W BISHOP CPA	Date	Check if self-employed ► <input type="checkbox"/>	Preparer's identifying number (see instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4 ► BEENE GARTER LLP 50 MONROE AVE NW SUITE 600 GRAND RAPIDS, MI 495032679		EIN ►	Phone no ► (616) 235-5200

May the IRS discuss this return with the preparer shown above? (see instructions) . . . . .  Yes  No

**Part III Statement of Program Service Accomplishments**

**1** Briefly describe the organization's mission

MISSION OF THE ACTON INSTITUTE IS TO PROMOTE A FREE AND VIRTUOUS SOCIETY CHARACTERIZED BY INDIVIDUAL LIBERTY AND SUSTAINED BY RELIGIOUS PRINCIPLES

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No

If "Yes," describe these new services on Schedule O

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No

If "Yes," describe these changes on Schedule O

**4** Describe the exempt purpose achievements for each of the organization's three largest program services by expenses  
Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

**4a** (Code ) (Expenses \$ 1,536,648 including grants of \$ 254,122 ) (Revenue \$ 310,441 )

EDUCATION ACTON'S EDUCATION DEPARTMENT IS AN OUTREACH PROGRAM FOR CURRENT AND FUTURE RELIGIOUS LEADERS, BOTH NATIONALLY AND INTERNATIONALLY, AND WORKS TO PROMOTE AN UNDERSTANDING OF MARKET PRINCIPLES AND TO ENCOURAGE THE ECONOMIC FREEDOM THAT CREATES OPPORTUNITY FOR ALL. THE INSTITUTE SPONSORS CONFERENCES AIMED AT EDUCATING RELIGIOUS LEADERS OF ALL DENOMINATIONS AND PROVIDES OPPORTUNITIES FOR AWARDS AND SCHOLARSHIPS THROUGH VARIOUS PROGRAMS OF THE OUTREACH AREA. THE INSTITUTE SPONSORED SEVEN DOMESTIC STUDENT CONFERENCES FOR FUTURE RELIGIOUS LEADERS AND OTHER SHAPERS OF THE MORAL CULTURE. THE CONFERENCES INCLUDED THE ACTON UNIVERSITY, WHICH IS AN ANNUAL COMPREHENSIVE FOUR-DAY EXPLORATION OF THE INTELLECTUAL FOUNDATIONS OF A FREE SOCIETY. MANY STUDENTS SELECTED TO ATTEND OUR CONFERENCES RECEIVE FULL OR PARTIAL SCHOLARSHIPS, WHICH COVER ROOM & BOARD EXPENSES AS WELL AS CONFERENCE FEES. IN 2009, CLOSE TO 400 STUDENTS FROM 38 DIFFERENT COUNTRIES ATTENDED, AND LIMITED TRAVEL SCHOLARSHIPS WERE PROVIDED IN CASES OF NEED. EXPENSES WERE ALSO INCURRED FOR A DISCOVERY PROCESS TO IDENTIFY AND EDUCATE CLERGY, STUDENTS, RELIGIOUS LEADERS AND SEMINARY FACULTY MEMBERS WHO ASSIST US IN FURTHERING OUR PROGRAMS. THE PROGRAMS DEPARTMENT IS ALSO AN INTERNATIONAL EDUCATIONAL RESOURCE DEDICATED TO ADVANCING THE BUSINESS ETHICS MODEL OF ENTREPRENEURIAL STEWARDSHIP, ENCOURAGING AND SUPPORTING BUSINESS LEADERS IN THE ACTIVE INTEGRATION OF INTEGRITY WITH THEIR PROFESSION. INTERNATIONALLY, WE HELD FOUR CONFERENCES ON VARIOUS TOPICS INCLUDING CATHOLIC EDUCATION, POVERTY AND DEVELOPMENT, AND INTELLECTUAL PROPERTY RIGHTS IN ROME, ITALY, AND A CO-SPONSORED A STUDENT CONFERENCE IN AUSTRIA. OUR ROME OFFICE ALSO HELD REGULAR SMALL LECTURES AT THE OFFICE.

**4b** (Code ) (Expenses \$ 397,034 including grants of \$ 34,050 ) (Revenue \$ 4,590 )

RESEARCH THE INSTITUTE'S ACADEMIC INVESTIGATIONS ARE CONDUCTED BY ITS RESEARCH DEPARTMENT. THE WORK PRODUCED BY RESEARCH INCLUDES THE DISCIPLINES OF PHILOSOPHY, ECONOMICS, THEOLOGY, AND HISTORY, AMONG OTHERS, AND IT INCLUDES THE CONTRIBUTIONS OF BOTH IN-HOUSE RESEARCH FELLOWS AND OF INVITED SCHOLARS. ADDITIONALLY, THE INVESTIGATIONS PRODUCED AT THE ACTON INSTITUTE ARE DELIVERED WIDELY AT CONFERENCES WITH THE GOAL OF REACHING THE SCHOLARLY COMMUNITY AT LARGE. THE RESEARCH DEPARTMENT PUBLISHES BOOKS, JOURNALS, MONOGRAPHS AND OCCASIONAL PAPERS. THE JOURNAL OF MARKETS & MORALITY IS A SEMI-ANNUAL REFEREED JOURNAL THAT PROVIDES A FORUM FOR SCHOLARS TO ENGAGE IN ISSUES CONCERNING THE MORALITY OF THE MARKETPLACE. THE CHRISTIAN SOCIAL THOUGHT SERIES EXAMINES, IN EACH VOLUME, A KEY ECONOMIC ISSUE FACING THE CHRISTIAN CHURCH. THE ETHICS AND ECONOMICS SERIES PRODUCES BOOKS THAT INTEGRATE NATURAL LAW THEORY AND ECONOMIC THOUGHT. THE RESEARCH DEPARTMENT ALSO MANAGES ACTON'S SCHOLARSHIP PROGRAMS. THE ANNUAL NOVAK AWARD RECIPIENT WAS PRESENTED WITH A PRIZE TO ACKNOWLEDGE AND REWARD NEW RESEARCH INTO THE RELATIONSHIP BETWEEN RELIGION, ECONOMIC FREEDOM, AND THE FREE AND VIRTUOUS SOCIETY. FELLOWSHIPS WERE AWARDED TO PROVIDE FINANCIAL ASSISTANCE, IN THE FORM OF ACADEMIC FELLOWSHIPS AND TRAVEL GRANTS, TO PROMISING SEMINARIANS AND GRADUATE STUDENTS WHO ARE ADVANCING AN UNDERSTANDING OF THE CONNECTION BETWEEN ECONOMIC LIBERTY AND RELIGIOUS VALUES.

**4c** (Code ) (Expenses \$ 735,303 including grants of \$ 16,338 ) (Revenue \$ 69,695 )

MEDIA THE MEDIA DEPARTMENT PROMOTES ACTON'S MESSAGE THROUGH VARIOUS MEDIA PRODUCTS AND OUTLETS, IN ADDITION TO THE ADMINISTRATION OF HIGHLY SELECTIVE AWARDS. IN 2009 DISTRIBUTION OF OUR FEATURE LENGTH FILMS CONTINUED WITH SCREENINGS IN LOCATIONS ACROSS THE U.S. AND INTERNATIONALLY. THE FILMS ARE DESIGNED TO PROVIDE AN INTELLECTUALLY AND EMOTIONALLY PERSUASIVE PLATFORM FOR ACTON THEMES. "CALL OF THE ENTREPRENEUR" AND "BIRTH OF FREEDOM" WERE ALSO SOLD WIDELY THROUGH VARIOUS CHANNELS. A MULTI-PART VIDEO CURRICULUM CALLED "EFFECTIVE STEWARDSHIP" WAS RELEASED IN THE FALL THROUGH ZONDERVAN AND DISTRIBUTED IN RETAIL OUTLETS ACROSS THE COUNTRY AS WELL AS ONLINE. THE MEDIA DEPARTMENT MANAGES THE GROWING ACTON WEBSITE WHICH IS USING LEADING TECHNOLOGY TO INTEGRATE TEXT, AUDIO, AND VIDEO CONTENT IN AN EASILY ACCESSIBLE FORMAT FOR WEB VISITORS. THE SAMARITAN AWARD IS A BI-ANNUAL RECOGNITION OF THE BEST CHARITABLE ORGANIZATIONS IN THE UNITED STATES THAT OPERATE PREDOMINATELY WITH PRIVATE FUNDS. THE AWARD IDENTIFIES PROGRAMS THAT EXEMPLIFY THE KEY PRINCIPLES OF EFFECTIVE COMPASSION. THESE PRINCIPLES DEMONSTRATE ACCOUNTABILITY AND TRANSPARENCY IN THE PROGRAM AND FINANCIAL AREAS. THE EXCEPTIONAL CHARITIES RECOGNIZED BY THE SAMARITAN AWARD HELP INDIVIDUALS BREAK THE CYCLE OF DEPENDENCY BY PROVIDING HELP THAT IS DIRECT, PERSONAL, AND ACCOUNTABLE. IN 2009, THE SAMARITAN AWARD RECEIVED 300 APPLICATIONS AND RECOGNIZED FIFTEEN CHARITIES, ONE GRAND PRIZE WINNER AND FOURTEEN RUNNERS UP, FOR THEIR OUTSTANDING CHARITABLE PROGRAMS. THE CATHOLIC HIGH SCHOOL HONOR ROLL SELLECTS THE BEST 50 CATHOLIC SECONDARY SCHOOLS IN AMERICA. THE HONOR ROLL PROVIDES A POWERFUL RESOURCE TO PARENTS AND EDUCATORS BY ACKNOWLEDGING THOSE SCHOOLS THAT BEST MAINTAIN HIGH ACADEMIC STANDARDS, UPHOLD THEIR CATHOLIC IDENTITIES, AND PREPARE STUDENTS TO ACTIVELY ENGAGE THE WORLD. BY USING THE POWER OF INCENTIVES AND COMPETITION, THE BEST SCHOOLS ARE HIGHLIGHTED TO INSPIRE IMITATION AND ENCOURAGEMENT AMONG ALL THE SCHOOLS SINCE THE PROGRAM BEGAN IN 2004, MORE THAN 300 MEDIA STORIES HAVE HIGHLIGHTED THE FACT THAT THESE SCHOOLS HAVE EARNED THIS DISTINCTION AND ARE REMAINING FAITHFUL TO THEIR CALLING.

**4d** Other program services (Describe in Schedule O ) See also Additional Data for Description

(Expenses \$ 699,397 including grants of \$ ) (Revenue \$ 42,775 )

**4e** Total program service expenses \$ 3,368,382

**Part IV Checklist of Required Schedules**

**1** Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A

**2** Is the organization required to complete Schedule B, Schedule of Contributors?

**3** Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I

**4** **Section 501(c)(3) organizations.** Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II

**5** **Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations.** Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III

**6** Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I

**7** Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II

**8** Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III

**9** Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV

**10** Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V

**11** Is the organization's answer to any of the following questions "Yes"? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.
 

- Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.
- Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.
- Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.
- Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.
- Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.
- Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.

**12** Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII

**12A** Was the organization included in consolidated, independent audited financial statements for the tax year?  Yes  No  
*If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional*  12A  No

**13** Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

**14a** Did the organization maintain an office, employees, or agents outside of the United States?

**b** Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I

**15** Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U.S.? If "Yes," complete Schedule F, Part II

**16** Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U.S.? If "Yes," complete Schedule F, Part III

**17** Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I

**18** Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II

**19** Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III

**20** Did the organization operate one or more hospitals? If "Yes," complete Schedule H

	Yes	No
<b>1</b>	Yes	
<b>2</b>	Yes	
<b>3</b>		No
<b>4</b>		No
<b>5</b>		
<b>6</b>		No
<b>7</b>		No
<b>8</b>		No
<b>9</b>		No
<b>10</b>		No
<b>11</b>	Yes	
<b>12</b>	Yes	
<b>13</b>		No
<b>14a</b>	Yes	
<b>14b</b>	Yes	
<b>15</b>	Yes	
<b>16</b>	Yes	
<b>17</b>		No
<b>18</b>	Yes	
<b>19</b>		No
<b>20</b>		No

**Part IV Checklist of Required Schedules (continued)**

<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	<b>21</b>	Yes	
<b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	<b>22</b>	Yes	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	<b>23</b>	Yes	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to line 25	<b>24a</b>	No	
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	<b>24b</b>		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	<b>24c</b>		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	<b>24d</b>		
<b>25a</b> <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	<b>25a</b>	No	
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	<b>25b</b>	No	
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II	<b>26</b>	No	
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? If "Yes," complete Schedule L, Part III	<b>27</b>	No	
<b>28</b> Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
<b>a</b> A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	<b>28a</b>	No	
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	<b>28b</b>	No	
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or owner? If "Yes," complete Schedule L, Part IV	<b>28c</b>	No	
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	<b>29</b>	Yes	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	<b>30</b>	No	
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	<b>31</b>	No	
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	<b>32</b>	No	
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? If "Yes," complete Schedule R, Part I	<b>33</b>	No	
<b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1	<b>34</b>	No	
<b>35</b> Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	<b>35</b>	No	
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	<b>36</b>	No	
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	<b>37</b>	No	
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O	<b>38</b>	Yes	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096, <i>Annual Summary and Transmittal of U.S. Information Returns</i> . Enter -0- if not applicable	<b>1a</b>	39
<b>1b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	<b>1b</b>	0
<b>1c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>1c</b>	Yes
<b>2a</b>	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return	<b>2a</b>	39
<b>2b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions)	<b>2b</b>	Yes
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	<b>3a</b>	Yes
<b>3b</b>	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	<b>3b</b>	Yes
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>	Yes
<b>4b</b>	If "Yes," enter the name of the foreign country <b>IT</b> See the instructions for exceptions and filing requirements for Form TD F 90-22 1, Report of Foreign Bank and Financial Accounts		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>	No
<b>5b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>	No
<b>5c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?	<b>5c</b>	
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	<b>6a</b>	No
<b>6b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>	
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>7a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>	Yes
<b>7b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>	Yes
<b>7c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>	No
<b>7d</b>	If "Yes," indicate the number of Forms 8282 filed during the year		
<b>7e</b>	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>	No
<b>7f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>	No
<b>7g</b>	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>	
<b>7h</b>	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?	<b>7h</b>	
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>9a</b>	Did the organization make any taxable distributions under section 4966?	<b>9a</b>	
<b>9b</b>	Did the organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>	
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter		
<b>10a</b>	Initiation fees and capital contributions included on Part VIII, line 12	<b>10a</b>	
<b>10b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	<b>10b</b>	
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter		
<b>11a</b>	Gross income from members or shareholders	<b>11a</b>	
<b>11b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	<b>11b</b>	
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>	
<b>12b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	<b>12b</b>	

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

### Section A. Governing Body and Management

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body . . .	<b>1a</b> 14	
<b>b</b> Enter the number of voting members that are independent . . .	<b>1b</b> 13	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .	<b>2</b> No	
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? . . . . .	<b>3</b> No	
<b>4</b> Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed? . . . . .	<b>4</b> No	
<b>5</b> Did the organization become aware during the year of a material diversion of the organization's assets? . . . . .	<b>5</b> No	
<b>6</b> Does the organization have members or stockholders? . . . . .	<b>6</b> Yes	
<b>7a</b> Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? . . . . .	<b>7a</b> Yes	
<b>b</b> Are any decisions of the governing body subject to approval by members, stockholders, or other persons? . . . . .	<b>7b</b> No	
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
<b>a</b> The governing body? . . . . .	<b>8a</b> Yes	
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	<b>8b</b> Yes	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O . . . . .	<b>9</b> No	

### Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Does the organization have local chapters, branches, or affiliates? . . . . .	<b>10a</b> No	
<b>b</b> If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization? . . . . .	<b>10b</b> No	
<b>11</b> Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	<b>11</b> Yes	
<b>11A</b> Describe in Schedule O the process, if any, used by the organization to review the Form 990 . . . . .		
<b>12a</b> Does the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	<b>12a</b> Yes	
<b>b</b> Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	<b>12b</b> Yes	
<b>c</b> Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done . . . . .	<b>12c</b> Yes	
<b>13</b> Does the organization have a written whistleblower policy? . . . . .	<b>13</b> Yes	
<b>14</b> Does the organization have a written document retention and destruction policy? . . . . .	<b>14</b> Yes	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official . . . . .	<b>15a</b> Yes	
<b>b</b> Other officers or key employees of the organization . . . . .	<b>15b</b> Yes	
If "Yes" to line a or b, describe the process in Schedule O (See instructions )		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .	<b>16a</b> No	
<b>b</b> If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .	<b>16b</b> No	

### Section C. Disclosure

**17** List the States with which a copy of this Form 990 is required to be filed ► MI

**18** Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply  
 Own website  Another's website  Upon request

**19** Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization ► KRIS MAUREN  
 161 OTTAWA AVE NW  
 GRAND RAPIDS, MI 495032718  
 (616) 454-3080

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**
**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year. Use Schedule J-2 if additional space is needed.

• List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

• List all of the organization's **current** key employees. See instructions for definition of "key employee."

• List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

• List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons.

Check this box if the organization did not compensate any current or former officer, director, trustee or key employee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)				(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	
REV ROBERT A SIRICO DIRECTOR	50.00	X		X			160,000	0 872
DAVID HUMPHREYS CHAIRMAN	1.00	X		X			0	0 0
FRANK HANNA III VICE CHAIRMAN	1.00	X		X			0	0 0
DAVID MILROY TREASURER	1.00	X		X			0	0 0
DR ALEJANDRO CHAFUEN SECRETARY	1.00	X		X			0	0 0
ROBERT COSTELLO DIRECTOR	1.00	X		X			0	0 0
DR GAYLEN BYKER DIRECTOR	1.00	X		X			0	0 0
BARRY CONNER DIRECTOR	1.00	X		X			0	0 0
JC HUIZENGA DIRECTOR	1.00	X		X			0	0 0
SIDNEY JANSMA JR DIRECTOR	1.00	X		X			0	0 0
JOHN KENNEDY III DIRECTOR	1.00	X		X			0	0 0
KENNETH MURASKI DIRECTOR	1.00	X		X			0	0 0
REV REN BROEKHUIZEN DIRECTOR	1.00	X		X			0	0 0
KRIS MAUREN EXECUTIVE DIRECTOR	50.00			X			158,000	0 15,200
TOM VOGT DIRECTOR OF FINANCE	50.00			X			65,417	0 9,625

<b>1b Total</b>	383,417	0	25,697
-----------------	---------	---	--------

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **■2**

		<b>Yes</b>	<b>No</b>
<b>3</b> Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual	<b>3</b>		No
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	<b>4</b>	Yes	
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person	<b>5</b>		No

## Section B. Independent Contractors

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization

(A) Name and business address	(B) Description of services	(C) Compensation
<b>2</b> Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization <b>■0</b>		

**Part VIII Statement of Revenue**

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>Contributions, gifts, grants and other similar amounts</b>	<b>1a</b> Federated campaigns . . . . . <b>1a</b> <b>b</b> Membership dues . . . . . <b>1b</b> <b>c</b> Fundraising events . . . . . <b>1c</b> 105,965 <b>d</b> Related organizations . . . . . <b>1d</b> <b>e</b> Government grants (contributions) <b>1e</b> <b>f</b> All other contributions, gifts, grants, and similar amounts not included above <b>1f</b> 4,771,295 <b>g</b> Noncash contributions included in lines 1a-1f \$ 103,458 <b>h</b> <b>Total.</b> Add lines 1a-1f . . . . . ► 4,877,260				
<b>Program Service Revenue</b>	<b>2a</b> CONFERENCE AND MEETING <b>b</b> SALES OF MEDIA PRODUCT <b>c</b> SPEAKING ENGAGEMENTS <b>d</b> SUBSCRIPTIONS <b>e</b> EVENT FEES <b>f</b> All other program service revenue <b>g</b> <b>Total.</b> Add lines 2a-2f . . . . . ►	Business Code 900,099 900,099 900,099 900,099 900,099 399,591	282,921 69,677 41,766 5,027 200	282,921 69,677 41,766 5,027 200	
<b>3</b> Investment income (including dividends, interest and other similar amounts) . . . . . ► 17,749 17,749					
<b>4</b> Income from investment of tax-exempt bond proceeds . . . . . ►					
<b>5</b> Royalties . . . . . ►					
<b>6a</b> Gross Rents <b>b</b> Less rental expenses <b>c</b> Rental income or (loss) <b>d</b> Net rental income or (loss) . . . . . ►	(I) Real 18,167 21,225 -3,058 Net gain or (loss) . . . . . ►	(II) Personal 1,500 2,668 -1,168			
<b>7a</b> Gross amount from sales of assets other than inventory <b>b</b> Less cost or other basis and sales expenses <b>c</b> Gain or (loss) <b>d</b> Net gain or (loss) . . . . . ►	(I) Securities 27,680 59,148 -31,468	(II) Other 1,500 2,668 -1,168	-4,226		-4,226
<b>8a</b> Gross income from fundraising events (not including \$ 105,965 of contributions reported on line 1c) See Part IV, line 18 . . . . . <b>a</b> <b>b</b> Less direct expenses . . . . . <b>b</b> 59,148 <b>c</b> Net income or (loss) from fundraising events . . . . . ►					-31,468
<b>9a</b> Gross income from gaming activities See Part IV, line 19 . . . . . <b>a</b> <b>b</b> Less direct expenses . . . . . <b>b</b> <b>c</b> Net income or (loss) from gaming activities . . . . . ►					
<b>10a</b> Gross sales of inventory, less returns and allowances . <b>a</b> <b>b</b> Less cost of goods sold . . . . . <b>b</b> 52,686 <b>c</b> Net income or (loss) from sales of inventory . . . . . ►	72,507 52,686 19,821			19,821	
<b>Miscellaneous Revenue</b>	Business Code 900,099		8,089		8,089
<b>11a</b> MISCELLANEOUS REVENUE <b>b</b> <b>c</b> <b>d</b> All other revenue . . . . . <b>e</b> <b>Total.</b> Add lines 11a-11d . . . . . ►					
<b>12</b> <b>Total revenue.</b> See Instructions . . . . . ►	5,286,816	419,412	0		-9,856

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A) Total expenses</b>	<b>(B) Program service expenses</b>	<b>(C) Management and general expenses</b>	<b>(D) Fundraising expenses</b>
1 Grants and other assistance to governments and organizations in the U S See Part IV, line 21	19,015	19,015		
2 Grants and other assistance to individuals in the U S See Part IV, line 22	116,308	116,308		
3 Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16	169,187	169,187		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees . . . . .	409,114	293,060	51,012	65,042
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .				
7 Other salaries and wages	1,221,008	1,034,817	56,611	129,580
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions) . . . . .	41,106	33,742	2,625	4,739
9 Other employee benefits . . . . .	144,451	115,491	7,697	21,263
10 Payroll taxes . . . . .	92,609	73,495	3,629	15,485
11 Fees for services (non-employees)				
a Management . . . . .				
b Legal . . . . .	3,714	254	3,460	
c Accounting . . . . .	18,688	320	18,368	
d Lobbying . . . . .				
e Professional fundraising See Part IV, line 17 . . . . .				
f Investment management fees . . . . .				
g Other . . . . .	332,835	303,855	15,661	13,319
12 Advertising and promotion . . . . .	20,860	20,681	73	106
13 Office expenses . . . . .	364,710	294,009	24,197	46,504
14 Information technology . . . . .				
15 Royalties . . . . .				
16 Occupancy . . . . .	233,401	165,747	52,432	15,222
17 Travel . . . . .	188,335	139,198	22,976	26,161
18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .				
19 Conferences, conventions, and meetings . . . . .	386,942	385,061	805	1,076
20 Interest . . . . .				
21 Payments to affiliates . . . . .				
22 Depreciation, depletion, and amortization . . . . .	133,536	80,122	41,396	12,018
23 Insurance . . . . .				
24 Other expenses Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below )				
a HONORARIUMS	84,221	83,871		350
b MEALS AND ENTERTAINMENT	29,398	22,223	4,027	3,148
c MISCELLANEOUS EXPENSES	18,260	4,273	9,670	4,317
d PUBLICATIONS	16,472	13,653	1,693	1,126
e UBIT REFUND	-36,259		-36,259	
f All other expenses				
<b>25 Total functional expenses.</b> Add lines 1 through 24f	4,007,911	3,368,382	280,073	359,456
<b>26 Joint costs.</b> Check here <input checked="" type="checkbox"/> if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

**Part X Balance Sheet**

		<b>(A)</b> Beginning of year	<b>(B)</b> End of year
Assets	1 Cash—non-interest-bearing . . . . .	4,640	<b>1</b> 21,416
	2 Savings and temporary cash investments . . . . .	1,877,701	<b>2</b> 3,345,173
	3 Pledges and grants receivable, net . . . . .	1,265,062	<b>3</b> 1,233,700
	4 Accounts receivable, net . . . . .	54,785	<b>4</b> 89,481
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L . . . . .		<b>5</b>
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L . . . . .		<b>6</b>
	7 Notes and loans receivable, net . . . . .		<b>7</b>
	8 Inventories for sale or use . . . . .	97,706	<b>8</b> 76,371
	9 Prepaid expenses and deferred charges . . . . .	47,221	<b>9</b> 43,762
	10a Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D . . . . .	1,422,976	
	<b>10a</b>		
	b Less accumulated depreciation . . . . .	<b>10b</b> 948,399	531,329
			<b>10c</b> 474,577
	11 Investments—publicly traded securities . . . . .	204,846	<b>11</b> 170,617
	12 Investments—other securities See Part IV, line 11 . . . . .	1,072,488	<b>12</b> 907,989
	13 Investments—program-related See Part IV, line 11 . . . . .		<b>13</b>
	14 Intangible assets . . . . .		<b>14</b>
	15 Other assets See Part IV, line 11 . . . . .		<b>15</b>
	<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	5,155,778	<b>16</b> 6,363,086
Liabilities	17 Accounts payable and accrued expenses . . . . .	157,927	<b>17</b> 222,119
	18 Grants payable . . . . .		<b>18</b>
	19 Deferred revenue . . . . .		<b>19</b>
	20 Tax-exempt bond liabilities . . . . .		<b>20</b>
	21 Escrow or custodial account liability Complete Part IV of Schedule D . . . . .		<b>21</b>
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L . . . . .		<b>22</b>
	23 Secured mortgages and notes payable to unrelated third parties . . . . .		<b>23</b>
	24 Unsecured notes and loans payable to unrelated third parties . . . . .		<b>24</b>
	25 Other liabilities Complete Part X of Schedule D . . . . .	4,254	<b>25</b> 4,255
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	162,181	<b>26</b> 226,374
Net Assets or Fund Balances	<b>Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>		
	27 Unrestricted net assets . . . . .	3,594,644	<b>27</b> 4,163,498
	28 Temporarily restricted net assets . . . . .	1,398,953	<b>28</b> 1,973,214
	29 Permanently restricted net assets . . . . .		<b>29</b>
	<b>Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.</b>		
	30 Capital stock or trust principal, or current funds . . . . .		<b>30</b>
	31 Paid-in or capital surplus, or land, building or equipment fund . . . . .		<b>31</b>
	32 Retained earnings, endowment, accumulated income, or other funds . . . . .		<b>32</b>
	33 Total net assets or fund balances . . . . .	4,993,597	<b>33</b> 6,136,712
	<b>34 Total liabilities and net assets/fund balances . . . . .</b>	5,155,778	<b>34</b> 6,363,086

**Part XI Financial Statements and Reporting**

**1** Accounting method used to prepare the Form 990       Cash  Accrual  Other \_\_\_\_\_  
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O

**2a** Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .

**b** Were the organization's financial statements audited by an independent accountant? . . . . .

**c** If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?  
 If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O . . . . .

**d** If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both  
 Separate basis     Consolidated basis     Both consolidated and separated basis

**3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .

**b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . . .

	Yes	No
<b>2a</b>		No
<b>2b</b>	Yes	
<b>2c</b>	Yes	
<b>3a</b>		No
<b>3b</b>		

**2009****Open to Public  
Inspection****SCHEDULE A**  
**(Form 990 or 990EZ)****Public Charity Status and Public Support****Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.****► Attach to Form 990 or Form 990-EZ. ► See separate instructions.**Department of the Treasury  
Internal Revenue ServiceName of the organization  
ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY**Employer identification number**

38-2926822

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box )

1  A church, convention of churches, or association of churches **section 170(b)(1)(A)(i)**.

2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E )

3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.

4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state

5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II )

6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.

7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II )

8  A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II )

9  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III )

10  An organization organized and operated exclusively to test for public safety See **section 509(a)(4)**.

11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h

a  Type I      b  Type II      c  Type III - Functionally integrated      d  Type III - Other

e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?

(ii) a family member of a person described in (i) above?

(iii) a 35% controlled entity of a person described in (i) or (ii) above?

h Provide the following information about the supported organization(s)

	<b>Yes</b>	<b>No</b>
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support?
			Yes	No	Yes	No	Yes	No	
<b>Total</b>									

**Part II Support Schedule for Organizations Described in IRC 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)
**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")	3,606,202	4,610,609	4,617,966	5,901,396	4,877,260	23,613,433
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 <b>Total.</b> Add lines 1 through 3	3,606,202	4,610,609	4,617,966	5,901,396	4,877,260	23,613,433
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						3,983,569
6 <b>Public Support.</b> Subtract line 5 from line 4						19,629,864

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	3,606,202	163,226	4,617,966	5,901,396	4,877,260	23,613,433
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	171,883	163,226	222,186	135,399	17,749	710,443
9 Net income from unrelated business activities, whether or not the business is regularly carried on	20,900	27,070	38,990	25,545	27,680	140,185
10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets	31,196	26,347	56,075	88,043	80,596	282,257
11 <b>Total support</b> (Add lines 7 through 10)						24,746,318
12 Gross receipts from related activities, etc (See instructions)					12	820,615

**13 First Five Years** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here**

**Section C. Computation of Public Support Percentage**

14 Public Support Percentage for 2009 (line 6 column (f) divided by line 11 column (f))	14	79 320 %
15 Public Support Percentage for 2008 Schedule A, Part II, line 14	15	82 940 %
16a <b>33 1/3% support test—2009.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization		
b <b>33 1/3% support test—2008.</b> If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization		
17a <b>10%-facts-and-circumstances test—2009.</b> If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and <b>stop here</b> . Explain in Part IV how the organization meets the "facts and circumstances" test. The organization qualifies as a publicly supported organization		
b <b>10%-facts-and-circumstances test—2008.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and <b>stop here</b> . Explain in Part IV how the organization meets the "facts and circumstances" test. The organization qualifies as a publicly supported organization		
18 <b>Private Foundation</b> If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions		

**Part III Support Schedule for Organizations Described in IRC 509(a)(2)**  
 (Complete only if you checked the box on line 9 of Part I.)
**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public Support</b> (Subtract line 7c from line 6 )						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV )						
<b>13 Total support</b> (Add lines 9, 10c, 11 and 12 )						
<b>14 First Five Years</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and <b>stop here</b>						

**Section C. Computation of Public Support Percentage**

15 Public Support Percentage for 2009 (line 8 column (f) divided by line 13 column (f))	15
16 Public support percentage from 2008 Schedule A, Part III, line 15	16

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2009 (line 10c column (f) divided by line 13 column (f))	17
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18
<b>19a 33 1/3% support tests—2009.</b> If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization	
<b>b 33 1/3% support tests—2008.</b> If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization	
<b>20 Private Foundation</b> If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions	

**Part IV Supplemental Information.** Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. See instructions

---

2009

Open to Public  
Inspection**SCHEDULE D**  
(Form 990)Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**

► Complete if the organization answered "Yes," to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11, or 12.  
► Attach to Form 990. ► See separate instructions.

**Name of the organization**ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY**Employer identification number**

38-2926822

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  Yes  No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?  Yes  No

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

Preservation of land for public use (e.g., recreation or pleasure)  Preservation of an historically importantly land area

Protection of natural habitat  Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
2a Total number of conservation easements	
2b Total acreage restricted by conservation easements	
2c Number of conservation easements on a certified historic structure included in (a)	
2d Number of conservation easements included in (c) acquired after 8/17/06	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ► \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ► \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  Yes  No

6 Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ► \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?  Yes  No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ► \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X ► \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a Revenues included in Form 990, Part VIII, line 1 ► \$ \_\_\_\_\_

b Assets included in Form 990, Part X ► \$ \_\_\_\_\_

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

**3** Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

<b>a</b> <input type="checkbox"/> Public exhibition <b>b</b> <input type="checkbox"/> Scholarly research <b>c</b> <input type="checkbox"/> Preservation for future generations	<b>d</b> <input type="checkbox"/> Loan or exchange programs <b>e</b> <input type="checkbox"/> Other
--	--

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

**5** During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

**1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No

**b** If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
<b>1c</b>	
<b>1d</b>	
<b>1e</b>	
<b>1f</b>	

**2a** Did the organization include an amount on Form 990, Part X, line 21?  Yes  No

**b** If "Yes," explain the arrangement in Part XIV

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	<b>(a) Current Year</b>	<b>(b) Prior Year</b>	<b>(c) Two Years Back</b>	<b>(d) Three Years Back</b>	<b>(e) Four Years Back</b>
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Investment earnings or losses . . . . .					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

**2** Provide the estimated percentage of the year end balance held as**a** Board designated or quasi-endowment ► %**b** Permanent endowment ► %**c** Term endowment ► %**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by

	<b>Yes</b>	<b>No</b>
<b>3a(i)</b>		
<b>3a(ii)</b>		

**b** If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? . . . . .**4** Describe in Part XIV the intended uses of the organization's endowment funds**Part VI Investments—Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

	<b>(a) Cost or other basis (investment)</b>	<b>(b) Cost or other basis (other)</b>	<b>(c) Accumulated depreciation</b>	<b>(d) Book value</b>
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements . . . . .		470,533	299,569	170,964
<b>d</b> Equipment . . . . .		326,663	211,473	115,190
<b>e</b> Other . . . . .		625,780	437,357	188,423
<b>Total.</b> Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) . . . . .				474,577

**Part VII Investments—Other Securities.** See Form 990, Part X, line 12

**Total.** (Column (b) should equal Form 990, Part X, col (B), line 12.)

907.989

**Part VIII Investments—Program Related.** See Form 990, Part X, line 13

---

**Total.** (Column (b) should equal Form 990, Part X, col (B) line 13)

**Part IX Other Assets.** See Form 990, Part X, line 15

**Total** (Column (b) should equal Form 990, Part X, col (B) line 15)

**Part X Other Liabilities.** See Form 990, Part X, line 25.

**2. Fin 48 Footnote** In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

**Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements**

1 Total revenue (Form 990, Part VIII, column (A), line 12)	2	5,286,816
2 Total expenses (Form 990, Part IX, column (A), line 25)	2	4,007,911
3 Excess or (deficit) for the year Subtract line 2 from line 1	2	1,278,905
4 Net unrealized gains (losses) on investments	4	-135,790
5 Donated services and use of facilities	5	
6 Investment expenses	6	
7 Prior period adjustments	7	
8 Other (Describe in Part XIV)	8	
9 Total adjustments (net) Add lines 4 - 8	9	-135,790
10 Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	1,143,115

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1 Total revenue, gains, and other support per audited financial statements . . . . .	1	5,151,026
2 Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a Net unrealized gains on investments . . . . .	2a	-135,790
b Donated services and use of facilities . . . . .	2b	
c Recoveries of prior year grants . . . . .	2c	
d Other (Describe in Part XIV) . . . . .	2d	
e Add lines 2a through 2d . . . . .	2e	-135,790
3 Subtract line 2e from line 1 . . . . .	3	5,286,816
4 Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	4a	
b Other (Describe in Part XIV) . . . . .	4b	
c Add lines 4a and 4b . . . . .	4c	0
5 Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12 ) . . . . .	5	5,286,816

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1 Total expenses and losses per audited financial statements . . . . .	1	4,007,911
2 Amounts included on line 1 but not on Form 990, Part IX, line 25		
a Donated services and use of facilities . . . . .	2a	
b Prior year adjustments . . . . .	2b	
c Other losses . . . . .	2c	
d Other (Describe in Part XIV) . . . . .	2d	
e Add lines 2a through 2d . . . . .	2e	0
3 Subtract line 2e from line 1 . . . . .	3	4,007,911
4 Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	4a	
b Other (Describe in Part XIV) . . . . .	4b	
c Add lines 4a and 4b . . . . .	4c	0
5 Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18 ) . . . . .	5	4,007,911

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
		EFFECTIVE JANUARY 1, 2009, THE COMPANY ADOPTED FINANCIAL ACCOUNTING STANDARDS BOARD (FASB) PROVISIONS RELATED TO ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES, WHICH CLARIFIES THE ACCOUNTING AND REPORTING FOR UNCERTAINTIES IN INCOME TAX LAW. THE PROVISIONS PRESCRIBE A COMPREHENSIVE MODEL FOR THE FINANCIAL STATEMENT RECOGNITION, MEASUREMENT, PRESENTATION, AND DISCLOSURE OF UNCERTAIN TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN IN INCOME TAX RETURNS. THERE WAS NO IMPACT ON THE FINANCIAL STATEMENTS UPON ADOPTING THESE PROVISIONS.

**SCHEDULE F  
(Form 990)**

## **Statement of Activities Outside the United States**

OMB No 1545-0047

2009

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization

# ACTON INSTITUTE FOR THE STUDY OF RELIGION AND LIBERTY

**Employer identification number**

38-292682

**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

**1** **For grantmakers.** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .  Yes  No

**2** **For grantmakers.** Describe in Part IV the organization's procedures for monitoring the use of grant funds outside the United States

**3** Activities per Region. (Use Schedule E-1 (Form 990) if additional space is needed.)

**Part II Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Check this box if no one recipient received more than \$5,000 . . . . . ▶  Use Schedule F-1 (Form 990) if additional space is needed.

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . ► \_\_\_\_\_ 0

**Part III Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 16. Use Schedule F-1 (Form 990) if additional space is needed.

**Part IV Supplemental Information**

Complete this part to provide the information required in Part I, line 2, and any additional information

---

**SCHEDULE G**  
**(Form 990 or 990-EZ)**

## **Supplemental Information Regarding Fundraising or Gaming Activities**

OMB No. 1545-0047

2009

**Open to Public  
Inspection**

**Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19,  
or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.**

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

**F** Attach to Form 990 or Form 990-EZ. **F** See separate instructions.

---

Numerical Solution

Name of the organ

**ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY**

---

**Employer identification number**

38-292682

**Part I Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

**1** Indicate whether the organization raised funds through any of the following activities. Check all that apply

- a**  Mail solicitations
- b**  Internet and e-mail solicitations
- c**  Phone solicitations
- d**  In-person solicitations
- e**  Solicitation of non-government grants
- f**  Solicitation of government grants
- g**  Special fundraising events

**2a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising activities?  Yes  No

**b** If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

**3** List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

**Part II Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

	(a) Event #1 <b>ANNUAL DINNER</b> (event type)	(b) Event #2 (event type)	(c) Other Events (total number)	(d) Total Events (Add col (a) through col (c))
<b>Revenue</b>	1 Gross receipts . . .	133,645		133,645
	2 Less Charitable contributions . . .	105,965		105,965
	3 Gross income (line 1 minus line 2) . . .	27,680		27,680
<b>Direct Expenses</b>	4 Cash prizes . . .			
	5 Non-cash prizes . . .			
	6 Rent/facility costs . . .			
	7 Food and beverages . . .	29,673		29,673
	8 Entertainment . . .			
	9 Other direct expenses . . .	29,474		29,474
	10 Direct expense summary Add lines 4 through 9 in column (d) . . . . .			59,147
	11 Net income summary Combine lines 3, column d, and line 10. . . . .			-31,467

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

	(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col (a) through col (c))
<b>Revenue</b>	1 Gross revenue . . . . .			
<b>Direct Expenses</b>	2 Cash prizes . . . . .			
	3 Non-cash prizes . . . . .			
	4 Rent/facility costs . . . . .			
	5 Other direct expenses . . . . .			
	6 Volunteer labor . . . . .	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
	7 Direct expense summary Add lines 2 through 5 in column (d) . . . . .			
	8 Net gaming income summary Combine lines 1, column d, and line 7 . . . . .			

9 Enter the state(s) in which the organization operates gaming activities . . . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No
a Is the organization licensed to operate gaming activities in each of these states? . . . . .	<input type="checkbox"/> 9a	
b If "No," Explain _____		
10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?	<input type="checkbox"/> 10a	
b If "Yes," Explain _____		
11 Does the organization operate gaming activities with nonmembers? . . . . .	<input type="checkbox"/> 11	
12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? . . . . .	<input type="checkbox"/> 12	

	Yes	No
<b>13</b> Indicate the percentage of gaming activity operated in a The organization's facility . . . . . b An outside facility . . . . .	13a	13b
<b>14</b> Enter the name and address of the person who prepares the organization's gaming/special events books and records		
Name ►		
Address ►		
<b>15a</b> Does the organization have a contract with a third party from whom the organization receives gaming revenue? . . . . .	15a	
b If "Yes," enter the amount of gaming revenue received by the organization ► \$ _____ and the amount of gaming revenue retained by the third party ► \$ _____		
c If "Yes," enter name and address		
Name ►		
Address ►		
<b>16</b> Gaming manager information		
Name ►		
Gaming manager compensation ► \$ _____		
Description of services provided ►		
<input type="checkbox"/> Director/officer	<input type="checkbox"/> Employee	<input type="checkbox"/> Independent contractor
<b>17</b> Mandatory distributions		
a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . .		
b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ _____	17a	

**Schedule I  
(Form 990)****2009****Grants and Other Assistance to Organizations,  
Governments and Individuals in the United States**

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.

► Attach to Form 990

Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

Name of the organization

ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY

Employer identification number

38-2926822

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .  Yes  No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States . . . . .  ►

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed . . . . .  ►

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
DONOR'S TRUSTPO BOX 1305 109 N HENRY ST ALEXANDRIA, VA 22313	522166327		18,300				CHARITABLE CONTRIBUTION FOR PURPOSES DEEMED NECESSARY BY THE RECIPIENT

2 Enter total number of section 501(c)(3) and government organizations . . . . .  ► \_\_\_\_\_ 1

3 Enter total number of other organizations . . . . .  ► \_\_\_\_\_

**Part III Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Use Schedule I-1 (Form 990) if additional space is needed.

<b>(a) Type of grant or assistance</b>	<b>(b) Number of recipients</b>	<b>(c) Amount of cash grant</b>	<b>(d) Amount of non-cash assistance</b>	<b>(e) Method of valuation (book, FMV, appraisal, other)</b>	<b>(f) Description of non-cash assistance</b>
NOVAK AWARD - ACKNOWLEDGES AND REWARDS OUTSTANDING NEW RESEARCH INTO THE INTERRELATION OF RELIGION AND ECONOMIC LIBERTY	1	10,000			
See Additional Data Table					

**Part IV** **Supplemental Information.** Complete this part to provide the information required in Part I, line 2, and any other additional information.

**Schedule J  
(Form 990)****Compensation Information**

OMB No 1545-0047

**2009****Open to Public  
Inspection**Department of the Treasury  
Internal Revenue Service

**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**  
**► Complete if the organization answered "Yes" to Form 990, Part IV, question 23.**  
**► Attach to Form 990. ► See separate instructions.**

**Name of the organization**ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY**Employer identification number**

38-2926822

**Part I Questions Regarding Compensation**

Yes No

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items

<input type="checkbox"/> First-class or charter travel	<input type="checkbox"/> Housing allowance or residence for personal use
<input type="checkbox"/> Travel for companions	<input type="checkbox"/> Payments for business use of personal residence
<input type="checkbox"/> Tax indemnification and gross-up payments	<input checked="" type="checkbox"/> Health or social club dues or initiation fees
<input type="checkbox"/> Discretionary spending account	<input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)

**b** If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

**1b** Yes

**3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply

<input checked="" type="checkbox"/> Compensation committee	<input type="checkbox"/> Written employment contract
<input type="checkbox"/> Independent compensation consultant	<input checked="" type="checkbox"/> Compensation survey or study
<input checked="" type="checkbox"/> Form 990 of other organizations	<input checked="" type="checkbox"/> Approval by the board or compensation committee

**4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization

**a** Receive a severance payment or change-of-control payment?  
**b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?  
**c** Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III

**4a** No**4b** No**4c** No**Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.**

**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of

**a** The organization?

**b** Any related organization?

If "Yes," to line 5a or 5b, describe in Part III

**5a** No**5b** No

**6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of

**a** The organization?

**b** Any related organization?

If "Yes," to line 6a or 6b, describe in Part III

**6a** No**6b** No

**7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III

**7** No

**8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53.4958-4(a)(3)? If "Yes," describe in Part III

**8** No

**9** If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

**9**

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

**Part III Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Identifier	Return Reference	Explanation

SCHEDULE M  
(Form 990)

## NonCash Contributions

OMB No 1545-0047

2009

Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

►Complete if the organization answered "Yes" on Form  
990, Part IV, lines 29 or 30.  
► Attach to Form 990.

Name of the organization ACTON INSTITUTE FOR THE STUDY OF RELIGION AND LIBERTY	Employer identification number 38-2926822
--	--

## Part I Types of Property

	(a) Check if applicable	(b) Number of Contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1 Art—Works of art . . . . .				
2 Art—Historical treasures . . . . .				
3 Art—Fractional interests . . . . .				
4 Books and publications . . . . .	X		16,717	FAIR MARKET VALUE
5 Clothing and household goods . . . . .				
6 Cars and other vehicles . . . . .				
7 Boats and planes . . . . .				
8 Intellectual property . . . . .				
9 Securities—Publicly traded . . . . .	X	6	81,181	FAIR MARKET VALUE
10 Securities—Closely held stock . . . . .				
11 Securities—Partnership, LLC, or trust interests . . . . .				
12 Securities—Miscellaneous . . . . .				
13 Qualified conservation contribution—Historic structures . . . . .				
14 Qualified conservation contribution—Other . . . . .				
15 Real estate—Residential . . . . .				
16 Real estate—Commercial . . . . .				
17 Real estate—Other . . . . .				
18 Collectibles . . . . .				
19 Food inventory . . . . .				
20 Drugs and medical supplies . . . . .				
21 Taxidermy . . . . .				
22 Historical artifacts . . . . .				
23 Scientific specimens . . . . .				
24 Archeological artifacts . . . . .				
COMPUTER				
25 Other ►( EQUIPMENT ) . . . . .	X	1	5,560	FAIR MARKET VALUE
26 Other ►( _____ ) . . . . .				
27 Other ►( _____ ) . . . . .				
28 Other ►( _____ ) . . . . .				
29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement . . . . .		29		

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period? . . . . .	30a	No
b If "Yes," describe the arrangement in Part II		
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?	31	Yes
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell non-cash contributions? . . . . .	32a	No
b If "Yes," describe in Part II		
33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II		

**Part II**

**Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
------------	------------------	-------------

**2009****Open to Public  
Inspection****SCHEDULE O  
(Form 990)****Supplemental Information to Form 990**

**Complete to provide information for responses to specific questions on  
Form 990 or to provide any additional information.  
► Attach to Form 990.**

Department of the Treasury  
Internal Revenue Service**Name of the organization**  
ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY**Employer identification number**

38-2926822

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 6		THE ORGANIZATION HAS MEMBERS WHO MAY ELECT ONE OR MORE MEMBERS OF THE GOVERNING BODY, THE BOARD OF DIRECTORS. THE ORIGINAL MEMBERS WERE APPOINTED IN THE FOUNDING DOCUMENTS OF INCORPORATION. NEW MEMBERS MAY BE ADDED BY A TWO-THIRDS VOTE OF THE FULL MEMBERS. THE BOARD OF DIRECTORS, BY UNANIMOUS ACTION, MAY TERMINATE THE MEMBERSHIP OF ANY MEMBER WHO FAILS TO COMPLY WITH THE BYLAWS OR REGULATIONS
Form 990, Part VI, Section A, line 7a		MEMBERS HAVE THE ABILITY TO ELECT OR APPOINT ONE OR MORE MEMBERS OF THE ORGANIZATION'S GOVERNING BODY, THE BOARD OF DIRECTORS. THE BY-LAWS GRANT MEMBERS THE POWER TO FILL VACANCIES OR REMOVE EXISTING DIRECTORS BY A MAJORITY VOTE
Form 990, Part VI, Section B, line 11		A DRAFT COPY OF THE FORM 990 IS ELECTRONICALLY PROVIDED TO THE MEMBERS OF THE BOARD OF DIRECTORS FOR REVIEW PRIOR TO FILING. IN ADDITION, A COPY OF THE FORM 990 DRAFT WILL BE AVAILABLE IN A SECURED PART OF THE WEBSITE
Form 990, Part VI, Section B, line 12c		PERIODIC REVIEW OF COMPENSATION, BENEFITS, AND ANY OUTSIDE SERVICE ARRANGEMENTS AND PROVIDERS
Form 990, Part VI, Section B, line 15		THE BOARD INVESTIGATES AND DETERMINES EXECUTIVE DIRECTOR AND PRESIDENT SALARIES AND COMPENSATION. THE EXECUTIVE DIRECTOR AND HUMAN RESOURCES DETERMINE ALL OTHERS. THE PROCESS INCLUDES COMPARISON TO SIMILAR ORGANIZATIONS AND SALARY SURVEYS AS WELL AS ANALYSIS OF RESPONSIBILITIES AND PERFORMANCE
Form 990, Part VI, Section C, line 19		GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE MADE AVAILABLE UPON REQUEST
		FORM 990, PART XI, LINE 2C THERE HAS BEEN NO CHANGE IN THE PROCESSES PERFORMED BY THOSE WHO HAVE OVERSIGHT OF THE AUDIT FROM THE PRIOR YEAR

## **Additional Data**

**Software ID:**

**Software Version:**

**EIN:** 38-2926822

**Name:** ACTON INSTITUTE FOR THE STUDY OF  
RELIGION AND LIBERTY

### **Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)**

#### **4d. Other program services**

(Code	) (Expenses \$	699,397 including grants of \$	) (Revenue \$	42,775 )
-------	----------------	--------------------------------	---------------	----------

GENERAL EDUCATION THE INSTITUTE SEEKS TO REACH OUT TO BUSINESS LEADERS, POLICY MAKERS, AND RELIGIOUS AND COMMUNITY LEADERSHIP GROUPS THROUGH LECTURES AND VARIOUS WRITINGS THE 2009 ANNUAL DINNER WAS HELD TO PROMOTE OUTREACH AND TO THANK SUPPORTERS FOR THEIR PARTNERSHIP WITH THE INSTITUTE THE DINNER AND PROGRAM FESTIVITIES INCLUDED AN ADDRESS BY A PROMINENT KEYNOTE SPEAKER ON MATTERS OF INTEREST TO THE INSTITUTE AND ITS SUPPORTERS THERE WERE 500 IN ATTENDANCE AND ADMISSION WAS CHARGED TO DEFRAY EXPENSES INCURRED THE ACTON LECTURE SERIES HOSTED SIX LOCAL LUNCHEONS DURING THE YEAR, WITH AN AVERAGE ATTENDENCE OF 84 INDIVIDUALS PER LECTURE THE INSTITUTE ALSO SPONSORED SEVERAL OTHER LUNCHEON AND DINNER EVENTS AROUND THE COUNTRY ACTON INSTITUTE ALSO OPERATES A BOOKSTORE TO PROMOTE AND SELL ITS OWN PUBLICATIONS, IN ADDITION TO OUTSIDE PUBLICATIONS, RELATED TO OUR MISSION AND PROGRAM OUTREACH AREAS

**Form 990, Part VIII - Statement of Revenue - 2a - 2g Program Service Revenue -**

	<b>Business Code</b>	<b>(A) Total Revenue</b>	<b>(B) Related or Exempt Function Revenue</b>	<b>(C) Unrelated Business Revenue</b>	<b>(D) Revenue Excluded from Tax under IRC 512, 513, or 514</b>
CONFERENCE AND MEETING	900,099	282,921	282,921		
SALES OF MEDIA PRODUCT	900,099	69,677	69,677		
SPEAKING ENGAGEMENTS	900,099	41,766	41,766		
SUBSCRIPTIONS	900,099	5,027	5,027		
EVENT FEES	900,099	200	200		

**Form 990, Part IX - Statement of Functional Expenses - 24a - 24e Other Expenses**

<i><b>Do not include amounts reported on line 6b, 8b, 9b, and 10b of Part VIII.</b></i>	<b>(A) Total expenses</b>	<b>(B) Program service expenses</b>	<b>(C) Management and general expenses</b>	<b>(D) Fundraising expenses</b>
HONORARIUMS	84,221	83,871		350
MEALS AND ENTERTAINMENT	29,398	22,223	4,027	3,148
MISCELLANEOUS EXPENSES	18,260	4,273	9,670	4,317
PUBLICATIONS	16,472	13,653	1,693	1,126
UBIT REFUND	-36,259		-36,259	